



# The City of Scottsdale Automotive Dealerships Market Analysis

September 2004  
Economic Vitality Department



# SCOTTSDALE AUTOMOTIVE DEALERSHIPS MARKET ANALYSIS

## A MARKET AND FEASIBILITY STUDY OUTLINING THE VIABILITY OF NEW CAR DEALERSHIPS IN SCOTTSDALE

August 2004

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## EXECUTIVE SUMMARY

The feasibility of additional new car dealers locating in Scottsdale looks very good for a variety of reasons. These include:

- The Phoenix metro area is a very dynamic market; it is rapidly growing, possesses a highly diversified economy and has excellent prospects for the future.
- The City of Scottsdale is one of the most desirable areas within metro Phoenix, both for businesses and residents. With its high quality of life, high service levels and low overall costs, it attracts not only affluent residents and tourists, but also businesses looking for a higher-end location.
- The resident population base of the market area for the Auto Mall in North Scottsdale is rapidly growing; the estimated population, within a 10 mile radius, is 460,563, a 68 percent increase from 1990. The projected population of 528,322 for 2008 indicates that this area will continue to grow.
- The total number of people employed within the 10 mile radius of the Auto Mall area is currently 212,375 employees, with an estimated average household income of \$93,610. The Scottsdale Airpark is currently home to nearly 2,300 businesses that employ over 44,000 people.
- The resident population base of the market area for the Motor Mile in south Scottsdale continues to grow; the estimated population, within a 10 mile radius, is 1,073,086. The projected population for 2008 is 1,214,889.
- The total number of people employed within the 10 mile radius of the Motor Mile is 747,790, with an estimated average household income of \$63, 262.
- Surface transportation improvements that are currently underway or which are planned will greatly enhance accessibility to the Scottsdale auto malls; the primary improvement is the Pima Freeway, which includes interchanges north and east of the north Auto Mall area.
- The existing new car dealerships in north Scottsdale are: AirparkChrysler/Jeep, Ed Moses Dodge, Legends Cadillac, Lou Grubb Ford, Lou Sobh, Motorsports of Scottsdale, Pontiac/GMC/Buick, Pinnacle Nissan/Infiniti, Right Honda, Right Toyota, Saturn of Scottsdale, Schumacher European, and Van Chevrolet.
- The existing new car dealerships in south Scottsdale are: Bill Heard Chevrolet, Chapman BMW/Dodge/Volkswagen, Five Star Ford, Infiniti of Scottsdale, Kachina Cadillac/Oldsmobile/Hummer/Saab, Mark Mitsubishi/Kia, Nissan of Scottsdale, Pitre Chrysler/Plymouth, Pitre Isuzu, Pitre Jeep, Pitre Pontiac/GMC/Buick/Hyundai, Pitre Subaru, Powell Volvo, Scott Toyota, Scottsdale Audi, Scottsdale Hummer, Jaguar/Rolls Royce/Bentley/Land Rover/Aston Martin Scottsdale, Scottsdale Lexus, and Ferrari/Maserati Scottsdale.
- The clusters closest in proximity to the Scottsdale market are the Northeast Phoenix, North Phoenix, and East Phoenix clusters. This leaves auto dealers in Scottsdale with an excellent opportunity to serve the rapidly growing and affluent northeast Valley.

## **INTRODUCTION/OVERVIEW**

- Introduction
- Metropolitan Phoenix Overview
- City of Scottsdale Overview
- Auto Center Trade Areas Defined

## INTRODUCTION

Automobile dealers traditionally have located near each other, creating strip commercial development along major arterial streets. By offering a wide variety of makes and models in one general area, these dealers tend to have a competitive advantage and greater sales potential; customers know that they will be able to compare different lines of cars without having to drive all over town. In addition, these areas tend to attract a variety of auto related services that support the dealer base in that area. Examples of this within the metro Phoenix area includes the east Camelback corridor in Phoenix and the Motor Mile in the southern part of Scottsdale.

The concept of the auto mall carries this idea one step farther, and is seen as the future of automobile retailing. The auto mall concentrates a number of dealers on a single site, providing the opportunity for a customer to park and walk to a number of dealerships. Auto malls have CC&Rs regulating architecture, landscaping, etc., as well as joint marketing programs and other common services and amenities. All of this provides greater recognition and visibility for the center, and therefore attracts more customers. An example of this within the metro Phoenix area includes the Frank Lloyd Wright corridor in the northern part of Scottsdale.

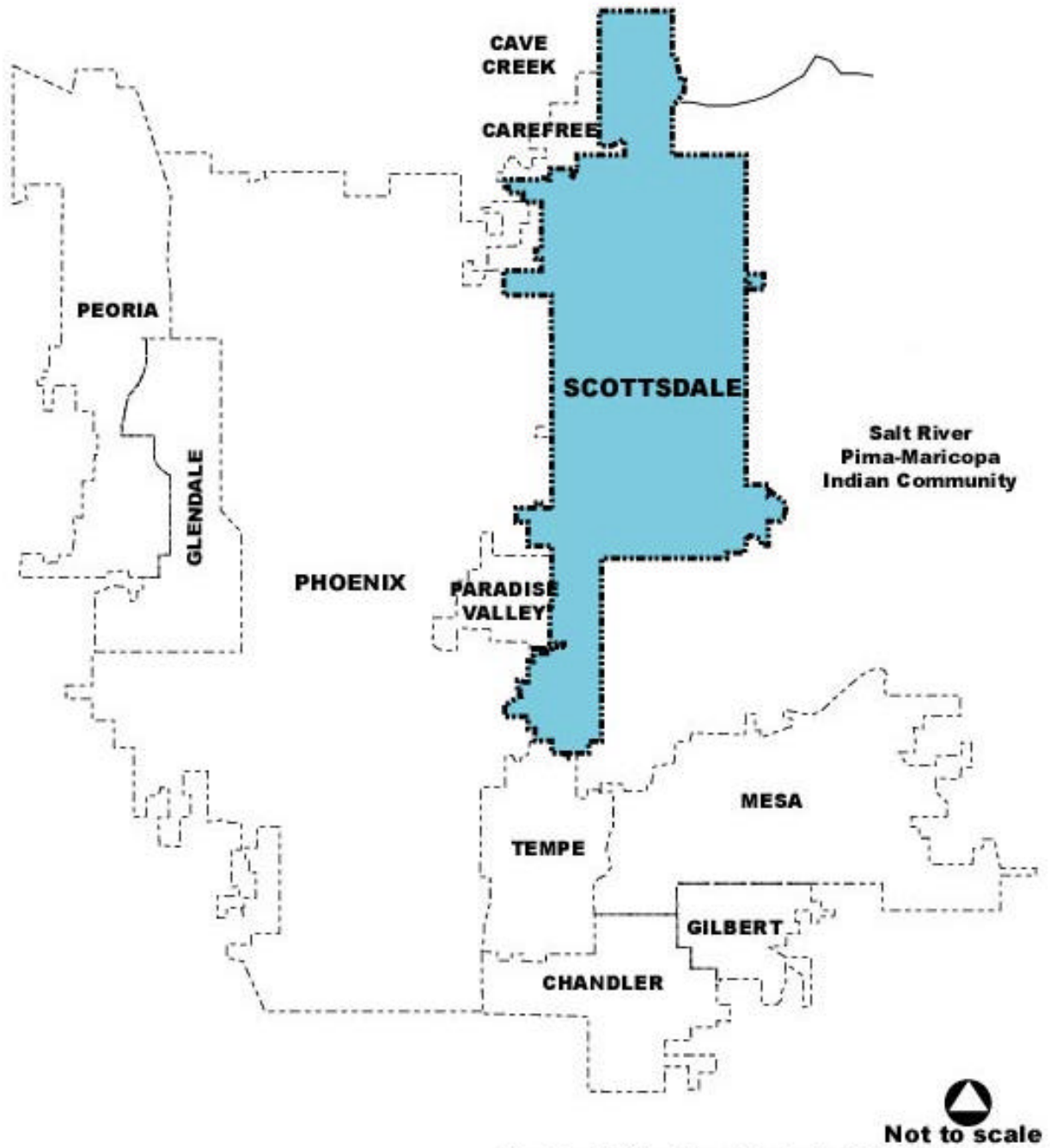
This report includes six major sections. Part 1 is an overview of the metropolitan area, the City of Scottsdale and the auto mall market area. Part 2 examines the residential market, while Part 3 looks at the employment market in the Scottsdale area. Part 4 lists the existing regional competition to the auto mall in metro Phoenix. Part 5 outlines the transportation factors that make Scottsdale an excellent location. Part 6 looks at automobile sales statistics and registration trends.

## **METROPOLITAN PHOENIX OVERVIEW**

The Phoenix metropolitan area is one of the most dynamic and growing areas in the country. Already the hub of the Southwest, metro Phoenix is rapidly becoming one of the nation's largest metropolitan areas. Driving this tremendous growth is a strong and diverse employment sector, with high-tech manufacturing and research, corporate headquarters, tourism and business/personal services as the basis for this strength. The following is a brief overview of some of the major developments occurring in the Phoenix area today:

- Between 1990 and 2000, the Phoenix metropolitan area has become one of the fastest growing major markets in the United States. From 1990 to 2000 the metropolitan population grew 46 percent with an actual increase of approximately 910,462. The current population in the metro area is nearly 3.4 million.
- Over half of all of the metro area manufacturing jobs are in high-tech industries. Employment in Greater Phoenix grew from 613,300 in 1979 to 1.79 million people in July 2004. Employment growth over the past 20 years, representing a 137 percent increase, has resulted in a large diverse labor pool. The 2003 unemployment rate for metro Phoenix was 5.0 percent.
- Significant transportation improvements are underway throughout the metro area. A \$5 billion freeway construction package (250 miles) was authorized by voters in 1985; substantial progress on these new freeways is being made. The Loop 101 Freeway now provides access to the entire Scottsdale auto market area.
- Tourism remains an important factor in the Phoenix metro area with over 13.29 million visitors in 2003. Today, there are over 55,000 rooms available in Metro Phoenix and that figure continues to increase.
- 42 major companies, with over \$150 million in capital investments, decided to relocate or expand their operations in the metro Phoenix area in 2003.
- Total retail sales in metro Phoenix were \$33.1 billion in 2003, an increase over sales of \$31.4 billion in the previous year.

**Map 1**  
**Metropolitan Phoenix**





## **SCOTTSDALE OVERVIEW**

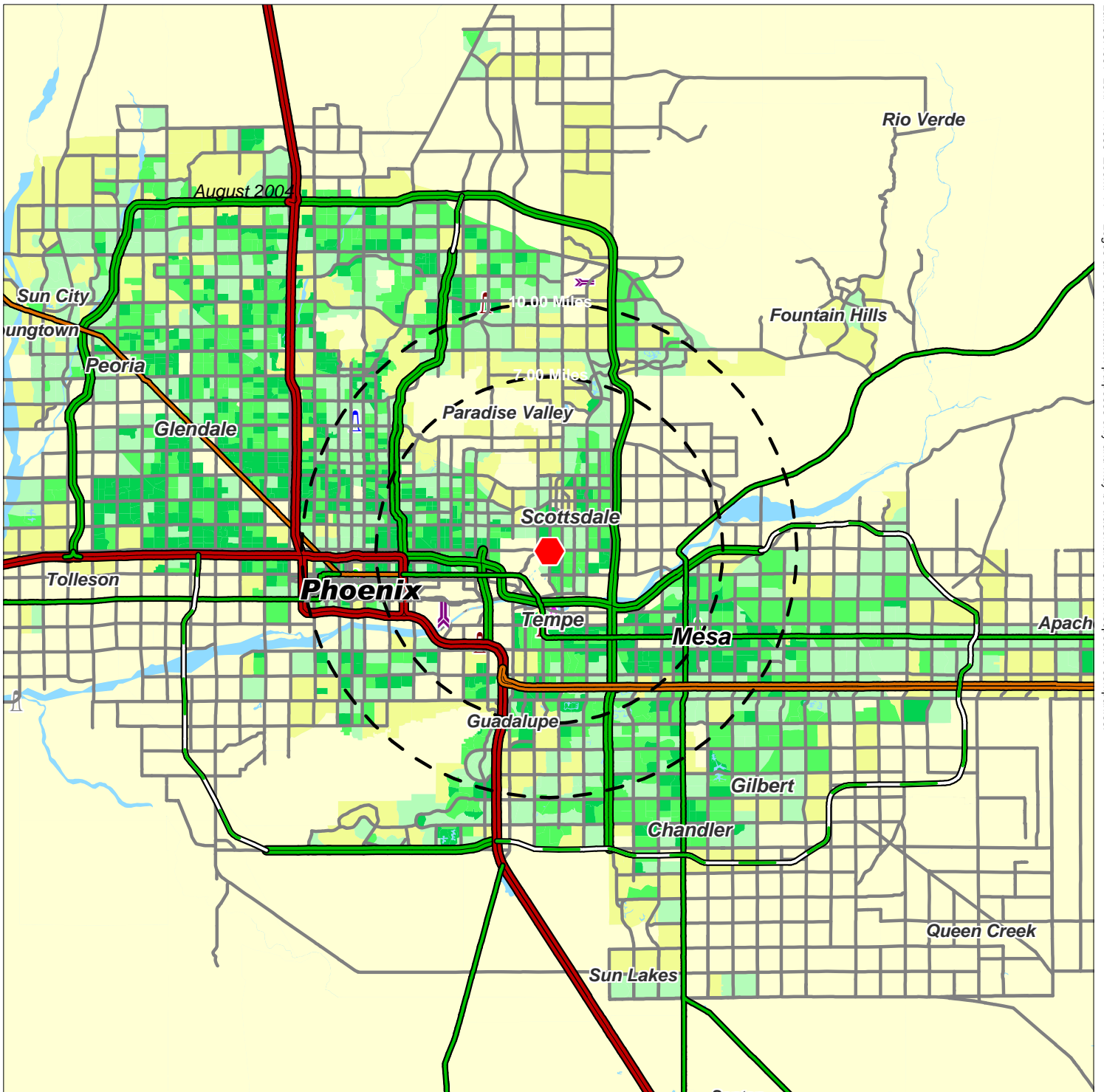
Scottsdale is considered to be one of the most desirable areas within metropolitan Phoenix, from both a business and a residential viewpoint. The City of Scottsdale has one of the strongest local economies, with low taxes and excellent services. Still, Scottsdale remains strongly committed to maintaining a very high quality of life. Development standards are the strictest in the state, and only quality development that is compatible with the area is allowed.

Some of the specific characteristics that make Scottsdale a unique and desirable location include:

- Scottsdale's population growth averaged 5.6 percent annually during the 1990s, higher than the 4.7 percent average for the metro area; the population currently stands at an estimated 217,555; median household income levels are the highest in the metro area at approximately \$66,600 in 2003.
- The assessed value of Scottsdale property on a per capita basis is 54 percent higher than the metro average. Scottsdale's AAA bond ratings are the highest for a public agency in Arizona.
- The City of Scottsdale's property tax rate (\$9.6281 per \$100 assessed valuation) is among the lowest tax rates in the metro area; on average, Scottsdale residents' total property tax bills are 33 percent lower than those in other Valley communities.
- Retail sales have grown dramatically over the past ten years. Sales tax collections in Scottsdale have increased 126 percent over the past ten years; the sales tax collected per capita is the highest of any community in the state.
- The fiscal year 2003/2004 posted 1,191 single-family housing permits in the City of Scottsdale. The number of housing permits continues at a healthy pace after the large expansion to the housing stock occurred between 1995-1998.
- Scottsdale is a tourism destination, with over 7.4 million visitors in 2003 with an economic impact of \$2.6 billion.
- Historically, the economic base of Scottsdale was dependent on the tourism industry; additionally, it served as a bedroom community to Phoenix. Today, a number of diverse economic activities are found in Scottsdale: corporate headquarters, research and development activities, high tech, and medical services. Scottsdale currently imports labor as the number of jobs available in Scottsdale outstrips the number of people in the labor force.

## **ESTIMATED MARKET AREAS FOR SCOTTSDALE**

Map 2 on the following page delineates the estimated market area for the north Scottsdale Auto Mall. This area includes a ten-mile radius from the Hayden and Frank Lloyd Wright Boulevard intersection. Map 3 delineates the estimated market area for the south Scottsdale “Motor Mile”. This area also includes a ten-mile radius extending from McDowell Road and 68<sup>th</sup> Street. These areas naturally overlap and share portions of market areas, but represent shorter drive times to each particular market area. Demographics for the market areas are included in Appendix A.



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# Population Density By Block Group

- 7,500 or More
- 5,000 to 7,500
- 2,500 to 5,000
- 1,000 to 2,500
- Less than 1,000

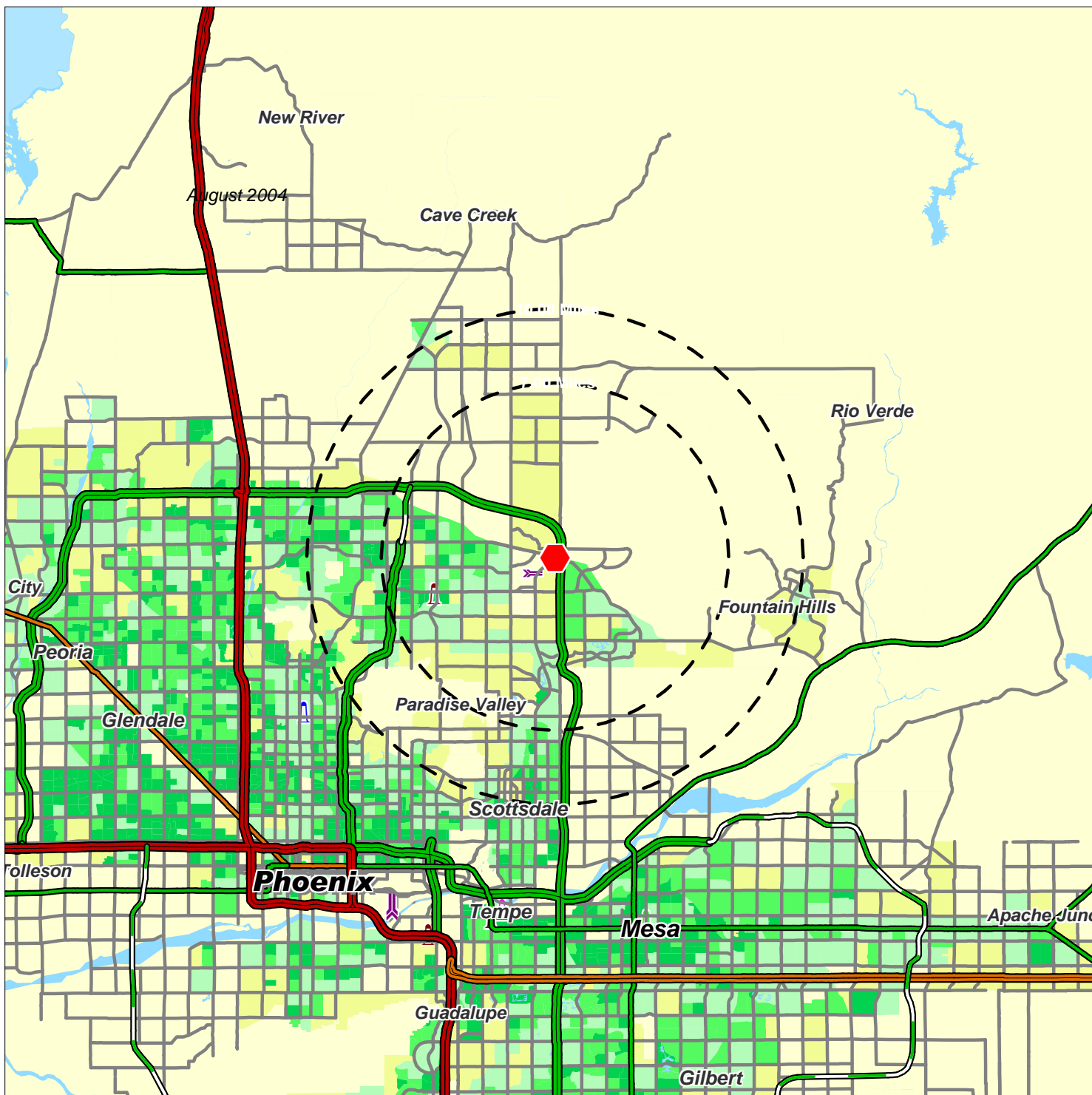
## South Scottsdale Market Area

**N. 68th Street & E. McDowell Road**

**Persons per Square Mile**



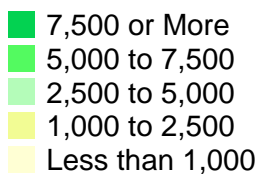
Data Source: Applied Geographic Solutions (2003)



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### Population Density By Block Group



Data Source: Applied Geographic Solutions (2003)

## North Scottsdale Market Area

**Hayden Road and Frank Lloyd Wright Blvd.**

**Persons per Square Mile**



## **SCOTTSDALE RESIDENT MARKET**

- RESIDENT MARKET OVERVIEW
- POPULATION GROWTH
- SPENDING POTENTIAL INDEX

## **RESIDENT MARKET OVERVIEW**

The most important component of the overall demand for new car dealerships within a certain area is the resident base within that area. This part of the study looks at the residential market in the northeast Valley, both in terms of numbers and socioeconomic breakdowns.

Overall, the population of the Phoenix metro area grew by 40 percent during the 1980's; up from about 1.5 million in 1980 to 2.1 million in 1990, to 2.9 million in 2000. During the decade between 1980 and 1990, the City of Scottsdale grew at a fast rate – 65 percent. During the early 1990's this trend slowed, but significant growth (approximately 6.5 percent annually) continues; Scottsdale's population as a whole is expected to grow by 18.3 percent and the metro area is expected to grow by 14 percent in the next five years.

The income level of Scottsdale residents is among the highest in the Valley. The estimated 2003 median household income in Scottsdale is \$66,600, compared to approximately \$48,600 for the metro area. These higher income households typically have greater disposable income, and therefore should have a greater disposition toward new car purchases.

Overall the population located within these markets is rapidly growing, and the residents tend to have high-income levels and excellent demographic characteristics that make them more likely to consider a new car purchase than any other population base in the Valley.

Table 1  
**POPULATION GROWTH**  
1990 - 2000

<b>Year</b>	<b>Scottsdale</b>	<b>Metro Area</b>	<b>North Scottsdale Market Area</b>	<b>South Scottsdale Market Area</b>
1990	130,069	1,952,447	274,804	858,544
1995	168,176	2,551,765	N/A	N/A
2000	202,705	2,862,909	418,147	996,799
Change (1990 - 1995)	29.3%	30.7%	N/A	N/A
Change (1995 - 2000)	20.5%	12.2%	NA	N/A
Change (1990 - 2000)	35.8%	31.8%	34.3%	13.9%

Source: US Census Bureau, Maricopa Association of Governments

City of Scottsdale Economic Vitality Department

Note: North Scottsdale Market Area includes portion of NE Phoenix, Fountain Hills, and Paradise Valley. The South Scottsdale Market Area includes portions of SE Phoenix, Tempe, and Mesa.

Table 2  
**MEDIAN HOUSEHOLD INCOME**  
1990 - 2000

<b>Income Growth (Median HH)</b>	<b>Scottsdale</b>	<b>Metro Area</b>	<b>North Scottsdale Market Area</b>	<b>South Scottsdale Market Area</b>
1990	\$ 39,037	\$ 30,797	N/A	N/A
1995	\$ 48,319	\$ 35,623	N/A	N/A
2000	\$ 57,484	\$ 45,358	N/A	N/A
2003 estimated	\$ 66,600	\$ 48,655	\$ 66,793	\$ 48,570
Change (1990 - 1995)	23.8%	15.7%	N/A	N/A
Change (1995 - 2000)	19.0%	27.3%	N/A	N/A
Change (1990 - 2000)	32.1%	32.1%	N/A	N/A

Source: Sites USA, United States Census Bureau

Note: North Scottsdale Market Area includes portion of NE Phoenix, Fountain Hills, and Paradise Valley. The South Scottsdale Market Area includes portions of SE Phoenix, Tempe, and Mesa.

Table 3

**SPENDING POTENTIAL INDEX FOR SCOTTSDALE**

ZIP CODE	FINANCIAL SERVICES				THE HOME						ENTERTAINMENT						PERSONAL			
					Home Improvements			Furnishings												
	Auto Loan	Home Loan	Investments	Retirement Plans	Home Repair	Lawn & Garden	Remodeling	Appliances	Electronics	Furniture	Restaurants	Sporting Goods	Theater & Concerts	Toys & Hobbies	Travel	Video Rental	Apparel	Auto After-market	Health Insurance	Pets & Supplies
85250	111	117	135	125	129	131	122	121	120	122	121	114	125	116	127	121	118	120	127	122
85251	105	1110	123	116	114	113	118	110	114	113	115	109	118	110	117	114	113	113	112	110
85254	146	184	186	209	160	173	183	157	155	174	162	176	188	170	179	144	162	162	142	168
85255	196	290	307	334	250	274	284	233	224	271	239	268	307	255	294	202	242	238	199	249
85256	100	65	62	64	75	77	57	83	72	69	69	72	56	71	62	76	69	76	86	81
85257	83	83	90	87	89	88	87	85	86	85	87	84	87	85	87	88	85	86	89	86
85258	157	189	225	215	195	210	193	181	173	192	178	180	205	178	204	168	176	179	179	186
85259	180	227	242	260	198	214	229	195	194	220	203	216	239	209	228	179	203	202	171	206
85260	157	180	191	205	159	171	184	161	163	177	168	175	186	170	178	153	166	169	148	171
85262	201	299	351	341	301	321	300	263	245	294	258	282	337	267	337	229	263	257	238	266
Arizona	100	100	108	105	96	100	101	99	99	100	98	97	100	97	99	96	97	101	98	101
U.S.	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100

Source: The Sourcebook of Zip Code Demographics, 2003



## **SCOTTSDALE EMPLOYMENT MARKET**

- EMPLOYMENT MARKET OVERVIEW
- EMPLOYMENT BY INDUSTRY
- LARGEST EMPLOYERS IN SCOTTSDALE
- JOB GROWTH v. LABOR FORCE GROWTH

## EMPLOYMENT MARKET OVERVIEW

The employment market in the northeast Valley is an important component to all car dealerships in the Scottsdale auto market. Not only do area employees represent potential vehicle sales, but they also provide a base for parts and service business.

The Scottsdale Airpark is the third largest employment center in metro Phoenix, and will continue to be a major force in the overall economy of the Valley in the years to come. Currently there are approximately 2,263 businesses employing 44,085 people within the Scottsdale Airpark. By the year 2010, the Airpark region is estimated to employ 50,000 people.

Table 4 provides a breakdown of total Scottsdale employment by industry for 2000, and employment projections for 2010.

Table 4  
**SCOTTSDALE EMPLOYMENT PROJECTIONS BY INDUSTRY AND YEAR**

	<b>2000</b>		<b>2010</b>	
	<b>Employment</b>	<b>Percent</b>	<b>Employment</b>	<b>Percent</b>
Agriculture	1,918	1.5%	2,225	1.4%
Mining	122	0.1%	123	0.08%
Construction	7,077	5.5%	7,938	5.1%
Low Tech Manufacturing	2,985	2.3%	3,639	2.3%
High Tech Manufacturing	8,138	6.3%	8,762	5.6%
Transport	3,842	3.0%	4,038	2.6%
Wholesale Trade	6,674	5.2%	8,378	5.4%
Retail Trade	18,725	14.5%	23,507	15.0%
Finance, Insurance, Real Estate	16,440	12.8%	18,141	11.6%
Business Services	26,848	20.9%	36,081	23.1%
Health Industry	12,785	9.9%	14,934	9.6%
Hospitality	14,652	11.4%	17,900	11.4%
Personal Services	8,446	6.6%	10,600	6.8%
<b>TOTAL</b>	<b>128,652</b>	<b>100.0%</b>	<b>156,267</b>	<b>100.0%</b>

Table 5 lists the 30 largest employers in Scottsdale as of August 2004. The businesses listed are technology companies, retailers, resorts, insurance companies, health care, education, and other service activities.

**Table 5**  
**Largest Employers in Scottsdale**

<b>Rank</b>	<b>Company Name</b>	<b>Employees</b>
1	Mayo Clinic	3,960
2	Scottsdale Healthcare Corporation	3,690
3	General Dynamics	3,400
4	Scottsdale Unified School District	3,000
5	City of Scottsdale	2,111
6	AdvancePCS, Inc.	2,023
8	Scottsdale Insurance Company	2,000
9	Scottsdale Princess Resort	1,100
10	The Vanguard Group	1,100
11	Phase II Solutions	800
12	Desert Mountain Properties	725
13	United States Postal Service - Scottsdale	686
14	McKesson Health Solutions	700
15	The Boulders Resort	680
16	JDA Software Group, Inc.	650
17	First Health Group	610
18	Rural Metro Corporation	608
19	United Blood Services	602
20	Dial Corp	600
21	Pegasus Solutions	600
22	Hyatt Regency at Gainey Ranch	450
23	Nordstrom's	450
24	Scottsdale Community College	400
25	Scottsdale Conference Resort	400
26	Scottsdale Plaza Resort	375
27	Costco	350
28	Dillards	350
29	Radisson Resort-Scottsdale	350
30	Best Software CRM Division	347

**Source:** City of Scottsdale, August 2004

Chart 1 compares job growth to labor force growth to population growth for metro Phoenix and Scottsdale. Between 1990 and 2000 the total number of jobs in the metro area grew by 42 percent. There are currently over 212,000 jobs in the north Scottsdale market area, and over 763,000 in the south Scottsdale market area. Both labor force and population growth in the market areas are expected to be slower than the rate of job increase, so it appears that this area will become more important in terms of jobs over time.

**Chart 1**  
**JOB GROWTH, LABOR FORCE GROWTH**  
**AND POPULATION GROWTH**

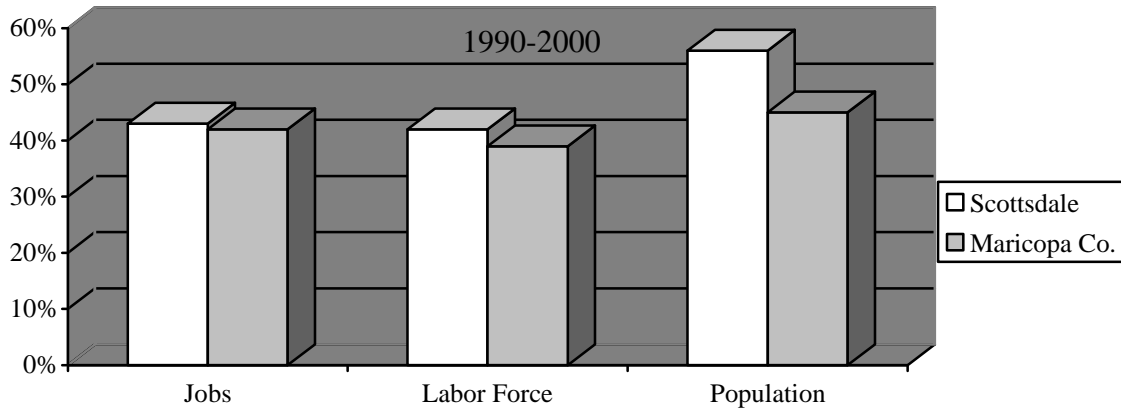
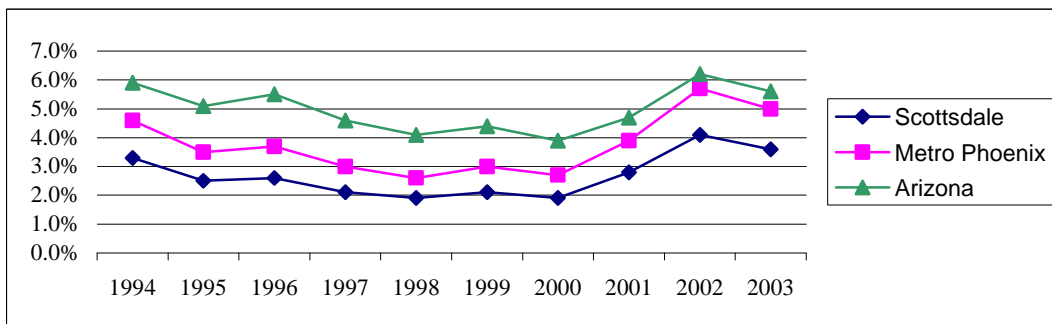


Chart 2 provides an overview of unemployment rates for Scottsdale, metro Phoenix, and the State of Arizona since 1990. Between 1990 and 2000, Scottsdale's unemployment rate ranged between 4.6 percent and 1.9 percent. Scottsdale has paralleled the metro Phoenix and Arizona state rates, but at a significantly lower level. The unemployment rate for Scottsdale has consistently been about 30 percent lower than the rate for the entire metro Phoenix area, and about 40 percent lower than the rate for the State of Arizona.

**Chart 2**  
**UNEMPLOYMENT RATES 1994-2003**  
Average Annual Rate



Source: Arizona Department of Economic Security

## **REGIONAL COMPETITION**

- Metro Phoenix Competition Overview
- Listing of Existing New Car Dealers
- Top 25 New Car Dealers in Metro Area
- Dealer Ownership Patterns

## REGIONAL COMPETITION OVERVIEW

Currently there are 12 major new car dealership clusters serving the metro Phoenix area. These dealership clusters are as follows:

North Scottsdale:	Frank Lloyd Wright Blvd and Hayden Road area 12 dealerships, 24 makes represented
South Scottsdale: (Motor Mile)	68 <sup>th</sup> Street and McDowell Road area 19 dealerships, 32 makes represented
Northeast Phoenix:	Scottsdale Road and Loop 101 area 9 dealerships, 11 makes represented
North Phoenix:	Bell Road and Interstate 17 area 15 dealerships, 26 models represented
East Phoenix:	12 <sup>th</sup> Street and Camelback Road area 11 dealerships, 15 makes represented
Central Phoenix:	Camelback Road and Interstate 17 area 7 dealerships, 10 makes represented
Tempe:	Autoplex (Warner Road and Interstate 10 area) Baseline and Rural Roads area 13 dealerships, 21 makes represented
Mesa/Apache Junction:	Broadway and Alma School Roads area Main Street and Mesa Drive area Superstition Springs Road and US Highway 60 area 16 dealerships, 24 makes represented
Chandler/Gilbert:	Arizona Avenue and US Highway 60 area Ray Road and Interstate 10 area 5 dealerships, 8 makes represented
Peoria:	Bell Road and Loop 101 area 12 dealerships, 16 makes represented
Glendale:	51 <sup>st</sup> Avenue and Glendale Road area 9 dealerships, 11 makes represented
West Valley:	Interstate 10 and west of 75 <sup>th</sup> Avenue area 8 dealerships, 11 makes represented

Information about the individual dealerships is included on map 4 and on tables 6 - 8 on the following pages. The clusters closest in proximity to the Scottsdale market are the Northeast Phoenix, North Phoenix, and East Phoenix clusters. This leaves auto dealers in Scottsdale with an excellent opportunity to serve the rapidly growing and affluent northeast Valley.

Map 4  
Metropolitan Phoenix Auto Dealership Clusters

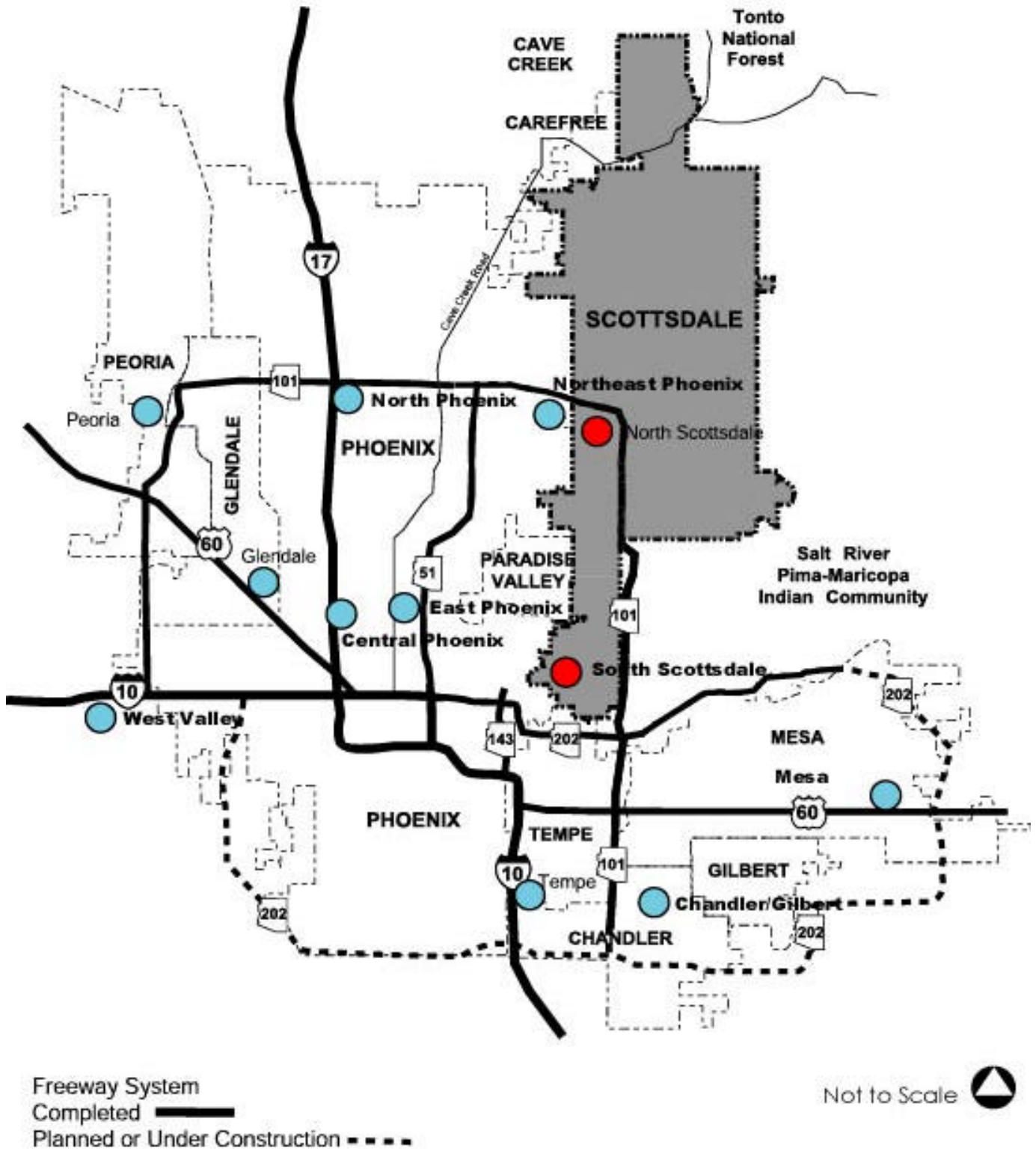


Table 6

**EXISTING METRO PHOENIX NEW CAR DEALERS****NORTH SCOTTSDALE**

<a href="#">Airpark Chrysler/Jeep</a>	15656 N. Hayden Rd	Chrysler/Jeep
<a href="#">Ed Moses Dodge</a>	7801 E. Frank Lloyd Wright Blvd	Dodge
<a href="#">Legends Cadillac*</a>	7901 E. Frank Lloyd Wright Blvd	Cadillac
<a href="#">Lou Grubb Ford</a>	8555 E. Frank Lloyd Wright Blvd	Ford
<a href="#">Lou Sobh Pontiac/GMC/Buick</a>	15333 N. Hayden Rd	Pontiac/GMC/Buick
<a href="#">Motorsports of Scottsdale</a>	8230 E. Raintree Dr	Aston-Martin/Bentley/BMW/Ferrari/ Lamborghini/Mercedes Benz/Panoz/ Porsche/Rolls Royce
<a href="#">Pinnacle Nissan/Infiniti</a>	7601 E. Frank Lloyd Wright Blvd	Nissan/Infiniti
<a href="#">Right Honda</a>	7875 E. Frank Lloyd Wright Blvd	Honda
<a href="#">Right Toyota</a>	7701 E. Frank Lloyd Wright Blvd	Toyota
<a href="#">Saturn of Scottsdale</a>	15656 N. Hayden Rd	Saturn
<a href="#">Schumacher European, Ltd.**</a>	15055 N. Hayden Rd	Mercedes Benz
<a href="#">Van Chevrolet</a>	8585 E. Frank Lloyd Wright Blvd	Chevrolet

\*Note: Legends Cadillac will be relocating to the SEC of Scottsdale Road and Loop 101 in 2003

\*\*Note: Schumacher European, Ltd. will be relocating West of Scottsdale Rd. and South of Loop 101 in 2004

**SOUTH SCOTTSDALE**

<a href="#">Bill Heard Chevrolet</a>	7227 E. McDowell Rd	Chevrolet
<a href="#">Chapman BMW/Dodge/Volkswagen</a>	6601 E. McDowell Rd	BMW/Dodge/Volkswagen
<a href="#">Five Star Ford</a>	7100 E. McDowell Rd	Ford
<a href="#">Infiniti of Scottsdale</a>	6420 E. McDowell Rd	Infiniti
<a href="#">Kachina Cadillac/Oldsmobile/ Hummer/Saab</a>	1200 N. Scottsdale Rd	Cadillac/Oldsmobile/Saab/Hummer
<a href="#">Mark Kia</a>	1000 N. Scottsdale Road	Kia
<a href="#">Mark Mitsubishi</a>	6440 E. McDowell Rd	Mitsubishi
<a href="#">Nissan of Scottsdale</a>	7000 E. McDowell Rd	Nissan
<a href="#">Pitre Buick/GMC/Pontiac</a>	6640 E. McDowell Rd	Buick/GMC/Pontiac
<a href="#">Pitre Chrysler/Jeep/Eagle</a>	6460 E. McDowell Rd	Chrysler/Jeep/Eagle
<a href="#">Pitre Isuzu/Hyundai</a>	6480 E. McDowell Rd	Isuzu/Hyundai
<a href="#">Pitre Subaru</a>	6420 E. McDowell Rd	Subaru
<a href="#">Powell Volvo</a>	6500 E. McDowell Rd	Volvo
<a href="#">Scott Toyota</a>	6850 E. McDowell Rd	Toyota
<a href="#">Scottsdale Audi</a>	6855 E. McDowell Rd	Audi
<a href="#">Scottsdale Hummer</a>	1101 N. Scottsdale Rd	Hummer
<a href="#">Jaguar/Rolls Royce/Bentley/ Land Rover/ Aston Martin Scottsdale</a>	6725 E. McDowell Rd	Jaguar/Rolls Royce/Bentley/Land Rover
<a href="#">Ferrari/Maserati Scottsdale</a>	6825 E. McDowell Rd	Ferrari/Maserati
<a href="#">Scottsdale Lexus</a>	6905 E. McDowell Rd	Lexus



## **NORTHEAST PHOENIX**

Acura North Scottsdale	7007 E. Chauncey Lane	Acura
Audi North Scottsdale	18088 N. Scottsdale Rd	Audi
BMW/Mini North Scottsdale	18018 N. Scottsdale Rd	BMW/Mini
Jaguar/Aston-Martin North Scottsdale	18118 N. Scottsdale Rd	Jaguar/Aston-Martin
Land Rover North Scottsdale	18100 N. Scottsdale Rd	Land Rover/Range Rover
Lincoln/Mercury North Scottsdale	7171 E. Chauncey Lane	Lincoln/Mercury
Porsche North Scottsdale	18000 N. Scottsdale Rd	Porsche
Volkswagen North Scottsdale	7001 E. Chauncey Lane	Volkswagen
Volvo North Scottsdale	7111 E. Chauncey Lane	Volvo

## **NORTH PHOENIX**

21 Bell Isuzu/Kia	2121 E. Bell Rd	Isuzu/Kia
21 Bell Subaru	2141 E. Bell Rd	Subaru
Bell Acura	1234 W. Bell Rd	Acura
Bell Ford	2401 W. Bell Rd	Ford
Bell Honda	701 W. Bell Rd	Honda
Bell Hyundai/Mazda/Mitsubishi/Suzuki	999 W. Bell Rd	Hyundai/Mazda/Mitsubishi/Suzuki
Bell Lexus	1901 W. Bell Rd	Lexus
Bell Road Toyota	2020 W. Bell Rd	Toyota
Lou Grubb Chrysler/Plymouth/Jeep	1645 W. Bell Rd	Chrysler/Plymouth/Jeep
Lou Grubb Dodge	16406 N. 26 <sup>th</sup> Ave	Dodge
Lund Cadillac/Saab	1311 E. Bell Rd	Cadillac/Saab
Midway Chevrolet	2323 W. Bell Rd	Chevrolet
Midway Nissan/Infiniti	2233 W. Bell Rd	Nissan/Infiniti
Midway Pontiac/GMC/Buick	2233 W. Bell Rd	Pontiac/GMC/Buick
Sanderson Lincoln/Mercury	2121 W. Bell Rd	Lincoln/Mercury

## **EAST PHOENIX**

ABC Nissan	1300 E. Camelback Rd	Nissan
Camelback Toyota	1333 E. Camelback Rd	Toyota
Camelback Volkswagen/Subaru	1499 E. Camelback Rd	Volkswagen/Subaru
Chapman BMW	1144 E. Camelback Rd	BMW
Chapman Lincoln/Mercury	1330 E. Camelback Rd	Lincoln/Mercury
Coulter Cadillac/Oldsmobile	1188 E. Camelback Rd	Cadillac/Oldsmobile
Courtesy Chevrolet	1233 E. Camelback Rd	Chevrolet
Mel Clayton Ford	1550 E. Camelback Rd	Ford
Showcase Honda	1400 E. Camelback Rd	Honda
Showcase Mazda	1521 E. Camelback Rd	Mazda
Showcase Pontiac/GMC	1331 E. Camelback Rd	Pontiac/GMC

## **CENTRAL PHOENIX**

Bill Luke Chrysler/Plymouth	2425 W. Camelback Rd	Chrysler/Plymouth
Bill Luke Dodge/Jeep	2331 W. Camelback Rd	Dodge/Jeep
Childress Automall Buick/Kia/Suzuki	2223 W. Camelback Rd	Buick/Kia/Suzuki
Lou Grubb Chevrolet	2646 W. Camelback Rd	Chevrolet

Performance Dodge  
Phoenix Motor Company  
Volvo on Camelback

4240 W. Glendale Ave  
225 W. Indian School Rd  
2143 W. Camelback Rd

Dodge  
Mercedes Benz  
Volvo

## **TEMPE**

Brown & Brown Nissan  
Chapman Chevrolet/Isuzu  
Earnhardt Chrysler/Plymouth  
Earnhardt Jeep/Suzuki  
Earnhardt Ford  
Hyundai of Tempe  
Saturn of Tempe  
Scottsdale Suzuki  
Tempe Dodge/Kia  
Tempe Honda  
Tempe Mitsubishi  
Tempe Pontiac/GMC/Buick  
Tempe Toyota

7755 S. Autoplex Loop  
1717 E. Baseline Rd  
577 E. Baseline Rd  
577 E. Baseline Rd  
777 E. Baseline Rd  
8050 S. Autoplex Loop  
7799 S. Autoplex Loop  
707 N. Scottsdale Rd  
7975 S. Autoplex Loop  
7900 S. Autoplex Loop  
8060 S. Autoplex Loop  
7780 S. Autoplex Loop  
7970 S. Autoplex Loop

Nissan  
Chevrolet/Isuzu  
Chrysler/Plymouth  
Jeep/Suzuki  
Ford  
Hyundai  
Saturn  
Suzuki  
Dodge/Kia  
Honda/Kia  
Mitsubishi  
Pontiac/GMC/Buick  
Toyota

## **MESA/APACHE JUNCTION**

Berge Ford  
Berge Mazda/Volkswagon  
Big Two Oldsmobile  
Big Two Oldsmobile/Mitsubishi  
Big Two Toyota  
Brown & Brown Chevrolet  
Brown & Brown Chevrolet  
Brown & Brown Nissan Mesa  
Coury Pontiac/GMC/Buick  
Darnier Chrysler/Jeep  
Earnhardt Superstition Ford  
Fiesta Lincoln/Mercury  
Honda Cars of Mesa  
Sun Pontiac/GMC  
Superstition Springs Chrysler/Jeep  
Superstition Springs Toyota

460 E. Auto Center Dr  
1515 W. Broadway Rd  
470 S. Alma School Rd  
6222 E. Auto Park Dr  
1301 W. Broadway Rd  
145 E. Main St  
6330 E. Superstition Springs Blvd  
1701 W. Broadway Rd  
6315 E. Auto Park Dr  
837 W. Main St  
3400 S. Tomahawk Rd (A. J.)  
1720 S. Mesa Dr  
1320 W. Broadway Rd  
1600 W. Main St  
6130 E. Auto Park Dr  
6136 E. Auto Loop Ave

Ford  
Mazda/Volkswagon  
Oldsmobile  
Oldsmobile/Mitsubishi  
Toyota  
Chevrolet  
Chevrolet  
Nissan  
Pontiac/GMC/Buick  
Chrysler/Jeep  
Ford  
Lincoln/Mercury  
Honda  
Pontiac/GMC  
Chrysler/Jeep  
Toyota

## **CHANDLER/GILBERT**

Chapman Chevrolet  
Earnhardt Dodge/Hyundai/Kia  
Earnhardt Ford/Mazda  
Mercedes Benz of Chandler  
Thorobred Chevrolet

1150 N. 54<sup>th</sup> St (Chandler)  
1301 N. Arizona Ave (Gilbert)  
7300 W. Orchid Ln (Chandler)  
7450 W. Orchid Ln (Chandler)  
2121 N. Arizona Ave (Chandler)

Chevrolet  
Dodge/Hyundai/Kia  
Ford/Mazda  
Mercedes Benz  
Chevrolet

## **PEORIA**

Arrowhead Honda	8380 W. Bell Rd	Honda
Biddulph Arrowhead	8424 W. Bell Rd	Isuzu/Oldsmobile
Larry Miller Dodge	8655 W. Bell Rd	Dodge
Larry Miller Hyundai	8633 W. Bell Rd	Hyundai
Larry Miller Toyota	8425 W. Bell Rd	Toyota
Liberty Buick	8737 W. Bell Rd	Buick
Lou Grubb Chevrolet Arrowhead	9055 W. Bell Rd	Chevrolet
Moore Chrysler/Plymouth/Jeep	8600 W. Bell Rd	Chrysler/Plymouth/Jeep
Peoria Kia	8660 W. Bell Rd	Kia
Peoria Pontiac/GMC	8860 W. Bell Rd	Pontiac/GMC
Saturn of Arrowhead	8801 W. Bell Rd	Saturn
Sunset Ford	9130 W. Bell Rd	Ford

## **GLENDALE**

Earnhardt Honda/Volkswagen	4611 W. Glendale Ave	Honda/Volkswagen
Friendly Pontiac/GMC/Jeep	4510 W. Glendale Ave	Saturn
Glendale Mitsubishi	4434 W. Glendale Ave	Mitsubishi
Larry Miller Mazda	4701 W. Glendale Ave	Mazda
Mark Mitsubishi	4434 W. Glendale Ave	Mitsubishi
Sanderson Ford	6400 N. 51 <sup>st</sup> Ave	Ford
Sands Chevrolet	5418 NW. Grand Ave	Chevrolet
Sunland Lincoln/Mercury	4700 W. Glendale Ave	Lincoln/Mercury
West Valley Nissan	4850 W. Glendale Ave	Nissan

## **WEST VALLEY**

Avondale Chrysler/Jeep	803 E. Van Buren (Avondale)	Chrysler/Jeep
Avondale Dodge	9901 W. Papago Fwy (Avondale)	Dodge
Avondale Mitsubishi/Suzuki	803 E. Van Buren St (Avondale)	Mitsubishi/Suzuki
Gateway Chevrolet	9901 W. Papago Fwy (Avondale)	Chevrolet
Pioneer Ford	7501 W. McDowell Rd (Phoenix)	Ford
Tom Jones Ford	23454 W. Hwy 85 (Buckeye)	Ford
West Valley Daewoo	15 W. Van Buren (Avondale)	Daewoo
Yates Pontiac/GMC	13845 W. Test Dr (Goodyear)	Pontiac/GMC

Table 7

**New Car Dealerships  
New Retail Units Sold  
Top Performers**

<b>Rank 2003 2002</b>	<b>Dealer</b>	<b>City</b>	<b>New Units Sold in 2002: Retail Fleet Total</b>	<b>Used Units Sold in 2002: Retail Wholesale Total</b>	<b>2002 Gross Sales (Millions)</b>	<b>2002 Truck Sales as % of New Vehicles Sold</b>	<b><u>Total # of:</u> Employees Sales staff Service staff</b>	<b>2002 Chief Executive Officer(s) General Manager</b>
<b>1</b> -	Midway Chevrolet - Isuzu	Phoenix	5,422 345 5,767	2,167 3,022 5,199	\$229.5	74.0%	408 235 173	John Cleaves Aaron Walker
<b>2</b> 2	Earnhardt's Gilbert Dodge Inc.	Gilbert	4,881 0 4,881	3,693 3,048 6,741	\$189.2	51.0%	439 219 176	Hal Earnhardt III Steve Avery
<b>3</b> 1	Earnhardt Ford Sales	Tempe	4,838 0 4,838	3,267 2,573 5,840	\$218.1	77.0%	477 124 274	Hal Earnhardt John Nissen
<b>4</b> 3	Tempe Toyota	Tempe	4,730 0 4,730	1,789 1,911 3,700	\$160.0	46.0%	200 WND WND	John Stanley WND
<b>5</b> 5	Brown & Brown Chevrolet	Mesa	4,446 655 5,101	2,273 2,389 4,662	\$286.0	80.0%	461 77 148	Steve Moore Tim Brown
<b>6</b> 6	Chapman Scottsdale Autoplex	Scottsdale	<b>4,313</b> <b>52</b> <b>4,365</b>	<b>1,924</b> <b>2,340</b> <b>4,264</b>	<b>\$248.7</b>	<b>30.0%</b>	<b>413</b> <b>145</b> <b>268</b>	<b>Jerry and J. Baxter</b> <b>Chapman</b> <b>Randy Scott</b>

<b>Rank 2003 2002</b>	<b>Dealer</b>	<b>City</b>	<b>New Units Sold in 2002: Retail Fleet Total</b>	<b>Used Units Sold in 2002: Retail Wholesale Total</b>	<b>2002 Total Sales (Millions)</b>	<b>2002 Truck Sales as % of New Vehicles Sold</b>	<b><u>Total # of:</u> Employees Sales staff Service staff</b>	<b>2002 Chief Executive Officer(s) General Manager</b>
<b>7</b> 7	Courtesy Chevrolet	Phoenix	4,227 1,487 5,714	2,692 1,621 4,313	\$248.7	76.0%	364 89 89	William Gruwell
<b>8</b> 8	Camelback Toyota	Phoenix	4,101 720 4,821	2,157 2,248 4,405	\$183.6	48.0%	261 91 42	Larry Van Tuyl, John O'Malley
<b>9</b> 4	Chapman Chevrolet Isuzu	Tempe	3,923 255 4,178	4,658 2,590 7,248	\$218.7	80.0%	432 151 281	Jerry and John Chapman Chris Strahan
<b>10</b> 10	Mel Clayton Ford	Phoenix	3,278 332 3,610	1,618 1,777 3,395	\$125.5	74.0%	194 60 53	Gerie Clayton
<b>11</b> 14	Van Chevrolet	Scottsdale	3,012 46 3,058	1,436 2,082 3,518	\$165.2	82.0%	268 64 80	Chuck Mullins
<b>12</b> 9	Pitre Buick Pontiac GMC	Scottsdale	2,973 0 2,973	1,927 1,372 3,299	\$117.1	32.0%	202 115 87	Dick Ehret
<b>13</b> 13	Showcase Honda	Phoenix	2,822 1,223 4,045	2,156 2,240 4,396	\$145.2	22.0%	252 WND WND	Tom Buis
<b>14</b> 15	ABC Nissan Inc.	Phoenix	2,759 318 3,077	2,712 2,203 4,915	\$127.5	35.0%	256 90 71	Larry Vav Tuyl John Schneider

<b>Rank 2003 2002</b>	<b>Dealer</b>	<b>City</b>	<b>New Units Sold in 2002: Retail Fleet Total</b>	<b>Used Units Sold in 2002: Retail Wholesale Total</b>	<b>2002 Total Sales (Millions)</b>	<b>2002 Truck Sales as % of New Vehicles Sold</b>	<b><u>Total # of:</u> Employees Sales staff Service staff</b>	<b>2002 Chief Executive Officer(s) General Manager</b>
<b>15</b> 11	Earnhardt Glendale Inc.	Glendale	2,685 0 2,685	1,659 1,399 3,058	\$90.1	19.0%	176 60 51	Hal Earnhardt III Gary McDougal
<b>16</b> -	Midway Nissan	Phoenix	2,565 4,242 6,807	1,136 1,632 2,768	\$223.1	47.0%	250 40 80	John Cleaves Jeff King
<b>17</b> -	<b>Pinnacle Nissan</b>	<b>Scottsdale</b>	<b>2,442</b> <b>2</b> <b>2,446</b>	<b>1,609</b> <b>1,531</b> <b>3,140</b>	<b>\$11.8</b>	<b>38.0%</b>	<b>215</b> <b>75</b> <b>76</b>	<b>John Cleaves</b> <b>Martin Peters</b>
<b>18</b> 18	Honda Cars of Mesa	Mesa	2,427 18 2,445	1,089 1,063 2,152	\$81.0	28.0%	172 38 45	Robert Thurston Monte Yocum
<b>19</b> 17	Brown & Brown Nissan Inc.	Tempe	2,282 0 2,282	1,627 1,323 2,950	\$96.0	18.0%	191 59 46	WND David Arnold
<b>20</b> 20	Thorobred Chevrolet	Chandler	2,120 203 2,323	2,014 1,351 3,365	\$92.4	76.0%	246 61 107	Dan Fehrenbach, John Simonson
<b>21</b> 12	<b>Lou Grubb Ford</b>	<b>Scottsdale</b>	<b>2,107</b> <b>1,558</b> <b>3,665</b>	<b>1,060</b> <b>1,055</b> <b>2,115</b>	<b>\$133.2</b>	<b>80.0%</b>	<b>184</b> <b>WND</b> <b>WND</b>	<b>Steve Moore</b> <b>Rodney Egnash</b>
<b>22</b> 23	Superstition Springs Toyota	Mesa	2,042 0 2,042	729 0 729	\$74.0	WND	130 30 25	Anthony Meritt Dennis Navarro

<b>Rank 2003 2002</b>	<b>Dealer</b>	<b>City</b>	<b>New Units Sold in 2002: Retail Fleet Total</b>	<b>Used Units Sold in 2002: Retail Wholesale Total</b>	<b>2002 Total Sales (Millions)</b>	<b>2002 Truck Sales as % of New Vehicles Sold</b>	<b><u>Total # of:</u> Employees Sales staff Service staff</b>	<b>2002 Chief Executive Officer(s) General Manager</b>
<b>23</b> 16	Lou Grubb Dodge	Phoenix	2,000 0 2,000	1,376 1,300 2,676	\$87.0	84.0%	142 65 40	Steve Moore Lance Iserman
<b>24</b> 22	Brown & Brown Nissan Mesa	Mesa	1,803 782 2,585	1,251 1,269 2,520	\$87.3	32.0%	134 68 38	Mike Maroone Ed Motzkin
<b>25</b> 21	Earnhardt Chrysler Jeep Inc.	Tempe	1,783 0 1,783	1,590 1,159 2,749	\$85.3	82.0%	132 57 65	Hal Earnhardt III Steve Arey

Source: Phoenix Business Journal October 10, 2003

Table 8

SCOTTSDALE AUTO DEALERSHIP OWNERSHIP PATTERNS STATUS OF NORTH & SOUTH AUTO DEALERS				
Make	Scottsdale/ McDowell	Ownership	Frank Lloyd Wright/ Hayden	Ownership
Ford	Five Star	Dr. Kenneth Scholz	Lou Grubb	Auto Nation
Chevrolet	Bill Heard	Bill Heard	Van	Larry Van Tuyl
Toyota	Scott	Larry Miller	Right	David Wilson
Dodge	Chapman	Chapman	Ed Moses	Ed Moses
Honda			Right	David Wilson
Nissan	Nissan of Scottsdale	Berge Group	Pinnacle	Auto Nation
GMC	Pitre	Auto Nation	Lou Sobh	Lou Sobh AutoNetwork
Pontiac	Pitre	Auto Nation	Lou Sobh	Lou Sobh AutoNetwork
Chrysler	Pitre	Auto Nation	Airpark Chrysler/Jeep	Larry Van Tuyl
Jeep	Pitre	Auto Nation	Airpark Chrysler/Jeep	Larry Van Tuyl
Buick	Pitre	Auto Nation	Lou Sobh	Lou Sobh AutoNetwork
VW	Chapman	Chapman	VW N. Scottsdale	United Auto Group
Hyundai	Pitre	Auto Nation		
Mitsubishi	Mark	Mark Debowy		
Mercury			Lincoln Mercury N. Scottsdale	United Auto Group
Mazda				
Saturn			Saturn of Scottsdale	Larry Van Tuyl
Oldsmobile				
Lexus	Scottsdale Lexus	United Auto Group	Bell Lexus	Berge Auto Group
Kia	Kia of Scottsdale	Mark Debowy	21 Bell	Bob Pitre
BMW	Chapman	Chapman	BMW N. Scottsdale	United Auto Group
Subaru	Pitre	Auto Nation	21 Bell	Bob Pitre
Cadillac	Kachina	John Lund	Legends	John Lund
Acura			Acura N. Scottsdale	United Auto Group
Lincoln			Lincoln Mercury N. Scottsdale	United Auto Group
Volvo	Powell	Stan Powell	Volvo N. Scottsdale	United Auto Group
Audi	Scottsdale Audi	United Auto Group	Audi N. Scottsdale	United Auto Group
Isuzu	Pitre	Auto Nation	21 Bell	Bob Pitre
Infiniti	Infiniti of Scottsdale	Larry Van Tuyl	Pinnacle	Larry Van Tuyl
Suzuki	Scottsdale Suzuki	John Mallo		
Daewoo				
Jaguar	Scottsdale Jaguar	United Auto Group	Jaguar N. Scottsdale	United Auto Group
Saab	Kachina	John Lund	Legends	John Lund
Plymouth	Pitre	Auto Nation		
Land Rover	Land Rover Scottsdale	United Auto Group	Land Rover N. Scottsdale	United Auto Group
Mercedes Benz			Motorsports of Scottsdale/ Schumacher European	Schumacher European
Porsche			Motorsports of Scottsdale/ Porsche N. Scottsdale	United Auto Group
Hummer	Scottsdale Hummer	John Lund	Legends	John Lund
Rolls/ Bentley	Scottsdale Rolls Royce/Bentley	United Auto Group	Motorsports of Scottsdale	Javad Maghami
Lamborghini			Motorsports of Scottsdale	Javad Maghami
Ferrari/ Maserati	Ferrari/Maserati Scottsdale	United Auto Group		
Aston Martin	Scottsdale Aston Martin	United Auto Group	Aston Martin North Scottsdale	United Auto Group

Note: Dealerships are located at Chauncey Ranch Autoplex, SWC Scottsdale Rd. and Loop 101 in Phoenix

Note: Dealership is located in Tempe

Note: Dealerships are located in Phoenix



## **TRANSPORTATION FACTORS**

- Transportation Overview
- Map of Metro Phoenix Freeway System
- Map of Pima Freeway

## **SURFACE TRANSPORTATION OVERVIEW**

Several major transportation projects that will significantly improve surface traffic flows throughout Scottsdale are either planned or under construction or recently opened.

### **PIMA FREEWAY**

The most significant project is the Pima Freeway (Loop 101), which follows a north-south orientation through much of Scottsdale near existing Pima Road; it connects with the Loop 202 and the Superstition Freeway to the south. Just north of the north Scottsdale auto mall, the freeway turns west and connects with I-17 in Phoenix (Black Canyon Freeway). This freeway is a part of an overall transportation package approved by the voters of Maricopa County in 1985. Map 5 shows the complete freeway system for the metro Phoenix area, including the Pima Freeway.

## **TRAFFIC COUNTS**

Shown below are the 1994 through 2002 average daily traffic counts and the 2020 estimated traffic counts for the auto mall and the motor mile:

Table 9

<b>TRAFFIC COUNTS FOR THE NORTH SCOTTSDALE AUTO MALL</b>						
	<b>1994</b>	<b>1996</b>	<b>1998</b>	<b>2000</b>	<b>2002</b>	<b>2020</b>
Frank Lloyd Wright Blvd. (W.of Greenway/Hayden Loop) between Scottsdale Rd. and Hayden Rd.	23,000	36,500	46,800	46,000	53,400	39,000
Frank Lloyd Wright Blvd. (E.of Greenway/Hayden Loop) between Scottsdale Rd. and Hayden Rd.	23,000	36,500	38,900	47,100	54,100	52,000
Scottsdale Rd. (at Frank Lloyd Wright) between Butherus and Frank Lloyd Wright	24,400	26,500	19,500	47,900	40,200	57,000
Pima Rd. (at Frank Lloyd Wright) between Raintree and Frank Lloyd Wright	16,400	20,900	34,100	N/A*	N/A*	N/A*
Hayden-Greenway Loop (S. of Frank Lloyd Wright) between Scottsdale Rd. and Frank Lloyd Wright						20,000
Pima Freeway between Scottsdale Road and Frank Lloyd Wright Blvd.						129,000
*Note: With the completion of the Pima Freeway (Loop 101), this section of Pima has become a frontage road.						

Source: Maricopa Association of Governments

<b>TRAFFIC COUNTS FOR SOUTH SCOTTSDALE MOTOR MILE</b>						
	<b>1994</b>	<b>1996</b>	<b>1998</b>	<b>2000</b>	<b>2002</b>	<b>2020</b>
McDowell Road between 64 <sup>th</sup> Street and Miller Road	151,200	138,100	130,700	122,200	97,800	138,000
Scottsdale Road between Oak and Roosevelt	131,700	164,700	144,00	132,300	86,800	151,000

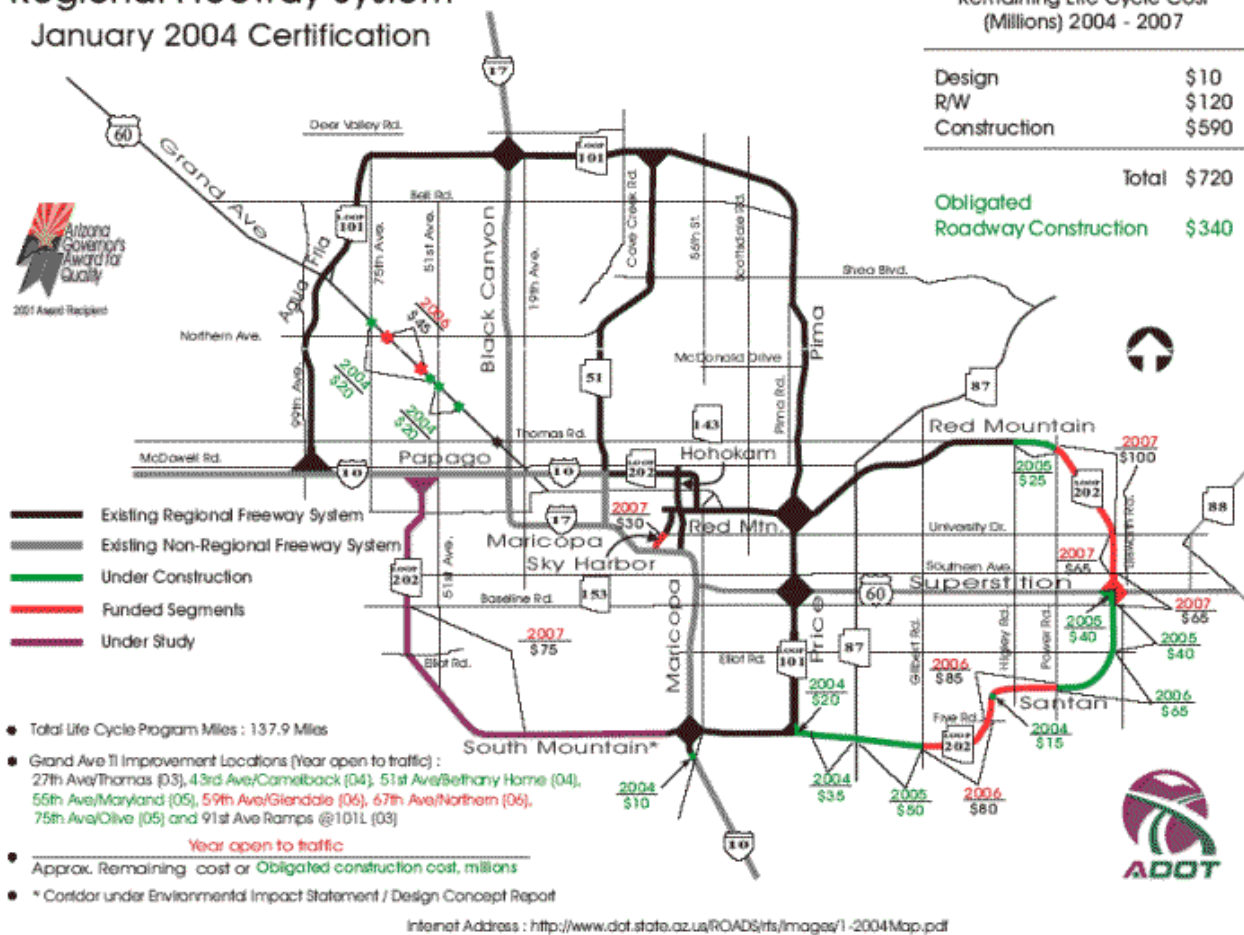
Source: Maricopa Association of Governments

## Map 5

### Metro Area Freeway System

## Regional Freeway System

### January 2004 Certification



## **SALES STATISTICS**

- US Sales Statistics
- Arizona Vehicle Sales Statistics
- Metro Phoenix Best Selling Luxury Vehicles
- Metro Phoenix Vehicle Registrations
- Scottsdale Vehicle Sales Statistics

## **SALES STATISTICS OVERVIEW**

This section examines sales and registration statistics on the national, state and local levels. Although the new car industry was in a slump in the early 1990's, recent years have shown significant sales growth.

Table 10 lists the number of car sales in the US during 2003 by make. Table 11 shows the best selling luxury vehicles in 2002 in Maricopa County. Table 12 gives an overview of motor vehicle registrations in metro Phoenix from 1995 to 2004 showing a 53.4 percent increase in passenger vehicles over a 10-year period. Metro Phoenix accounts for 76.9 percent of all passenger vehicle registrations and 56.5 percent of total vehicle registrations in Arizona in 2004. Arizona new car dealerships have the second highest average of total sales in the country at \$67,789,000.

Table 13 gives sales tax receipts in the "automotive" category for the City of Scottsdale. Total receipts have grown by 252 percent in the past 10 years; even when this is discounted for inflation, the growth is still quite dramatic. Table 14 gives the total gross receipts in the "automotive" category for the City of Scottsdale. Scottsdale is becoming an increasingly important player in the new car sales arena, partly because of its strategic location within the Valley and partly because of the excellent demographics of its residents.

Table 10

**NEW-VEHICLE SALES AND MARKET SHARE, BY MANUFACTURER**

<b>Year</b>	<b>DaimlerChrysler</b>	<b>Ford</b>	<b>General Motors</b>	<b>Toyota</b>	<b>Honda</b>	<b>Nissan</b>	<b>Volkswagen</b>	<b>Other Imports</b>	<b>Total</b>
1999	2,638,600 15.62%	4,115,600 24.36%	4,974,600 29.44	1,475,400 8.73%	1,076,900 6.37%	677,900 4.01%	381,500 2.26%	1,555,300 9.21%	16,895,300
2000	2,522,700 14.54%	4,147,700 23.91%	4,911,700 28.31%	1,619,200 9.33%	1,158,900 6.68%	752,800 4.34%	435,900 2.51%	1,800,800 10.38%	17,349,700
2001	2,273,200 13.10%	3,915,500 22.57%	4,852,500 27.97%	1,741,300 10.04%	1,207,600 6.96%	703,700 4.06%	438,900 2.53%	1,989,200 11.47%	17,121,900
2002	2,205,450 12.71%	3,576,250 20.61%	4,815,150 27.75%	1,756,150 10.12%	1,247,850 7.19%	739,850 4.26%	423,850 2.44%	2,052,950 11.83%	16,187,500
2003	2,313,464 14.60%	3,807,722 24.03%	4,716,050 28.35%	1,866,300 11.22%	1,349,850 8.11%	764,800 4.78%	389,100 2.34%	1,953,450 11.74%	16,634,700
<b>Average 1999-2003</b>	<b>2,390,683 14.20%</b>	<b>3,912,554 23.24%</b>	<b>4,854,000 28.83%</b>	<b>1,691,670 10.05%</b>	<b>1,208,220 7.18%</b>	<b>727,810 4.32%</b>	<b>413,850 2.46%</b>	<b>1,870,340 11.11%</b>	<b>16,837,820</b>

Source: N.A.D.A. Industry Analysis Division

Table 11

**BEST SELLING LUXURY VEHICLES IN METRO PHOENIX**

(Ranked by number of 2001 new vehicle sales)

<b>Rank 2003 2002</b>	<b>Model</b>	<b>Number of 2002 sales 2001 sales</b>	<b>Local Dealerships</b>
<b>1</b> 1	Cadillac DeVille	1,340 1,540	Coulter Cadillac, Kachina Cadillac, Legends Cadillac, Lund Cadillac
<b>2</b> 3	Cadillac Escalade (SUV)	1,097 761	Coulter Cadillac, Kachina Cadillac, Legends Cadillac, Lund Cadillac
<b>3</b> 2	Lincoln Town Car	861 963	Chapman Lincoln, Fiesta Lincoln, Jack Ross Lincoln, Sanderson Lincoln, Sunland Lincoln
<b>4</b> 5	Mercedes Benz ML (SUV)	519 509	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
<b>5</b> 4	BMW X5 (SUV)	518 568	BMW North Scottsdale, Chapman BMW, Chapman BMW of Scottsdale
<b>6</b> 7	Chevrolet Corvette	465 496	Bill Heard Chevrolet, Brown & Brown Chevrolet Mesa, Brown & Brown Chevrolet East Mesa, Chapman Chevrolet Chandler, Chapman Chevrolet Tempe, Courtesy Chevrolet, Gateway Chevrolet, Lou Grubb Chevrolet Arrowhead, Lou Grubb Chevrolet Phoenix, Midway Chevrolet, Sands Chevrolet, Thorobred Chevrolet, Van Chevrolet
<b>7</b> 11	BMW 5-Series	411 387	BMW North Scottsdale, Chapman BMW, Chapman BMW of Scottsdale
<b>8</b> 6	Lexus LS – Series	406 500	Bell Lexus, Scottsdale Lexus
<b>9</b> 10	Mercedes Benz E-Class	360 394	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
<b>10</b> 15	Mercedes Benz CL/CLK	338 307	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
<b>11</b> 12	Lincoln Navigator (SUV)	315 384	Chapman Lincoln, Fiesta Lincoln, Jack Ross Lincoln, Sanderson Lincoln, Sunland Lincoln
<b>11</b> 17	Mercedes Benz SL/SLK	315 232	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
<b>13</b> 8	Lexus GS-Series	309 472	Bell Lexus, Scottsdale Lexus
<b>14</b> -	Hummer	305 -	Scottsdale Hummer, Legends Hummer, Lund Hummer
<b>15</b> 14	Volvo S80	291 358	Powell Volvo, Volvo on Camelback
<b>16</b> 9	Mercedes Benz S-Class	275 415	Mercedes Benz of Chandler, Phoenix Motor Company, Schumacher European, Ltd
<b>17</b> 19	BMW 7-Series	260 192	BMW North Scottsdale, Chapman BMW, Chapman BMW of Scottsdale
<b>18</b> 16	Jaguar S-Type	236 290	Scottsdale Jaguar



<b>Rank 2003 2002</b>	<b>Model</b>	<b>Number of 2002 sales 2001 sales</b>	<b>Local Dealerships</b>
<b>19</b> 18	Lexus SC-Series	222 203	Bell Lexus, Scottsdale Lexus
<b>20</b> 13	Cadillac Seville	219 383	Coulter Cadillac, Kachina Cadillac, Legends Cadillac, Lund Cadillac
<b>21</b> 23	Porsche 911	210 155	Porsche North Scottsdale
<b>22</b> 20	Porsche Boxster	174 176	Porsche North Scottsdale
<b>23</b> -	Jaguar XJ-Series	169 105	Scottsdale Jaguar
<b>24</b> 22	Toyota Landcruiser (SUV)	124 156	Bell Road Toyota, Big Two Toyota, Camelback Toyota, Larry Miller Toyota, Right Toyota, Scott Toyota, Superstition Toyota, Tempe Toyota
<b>25</b> -	Land Rover Range Rover (SUV)	117 53	Land Rover Scottsdale, Land Rover North Scottsdale

Source: The Phoenix Business Journal, October 10, 2003

Table 12  
**MARICOPA COUNTY  
MOTOR VEHICLE REGISTRATIONS**

<b>Year</b>	<b>Passenger Vehicle (a)</b>	<b>Percent Change</b>	<b>Total Vehicles (b)</b>	<b>Percent Change</b>
2004	2,133,309	+4.1%	2,870,961	+4.7%
2003	2,048,527	+3.0%	2,742,367	+3.0%
2002	1,988,351	-.53%	2,662,006	+.51%
2001	1,999,033	+2.9%	2,648,559	+6.6%
2000	1,942,063	+3.9%	2,484,835	+4.0%
1999	1,870,388	+5.8%	2,388,870	+5.4%
1998	1,767,842	+4.9%	2,264,856	+14.7%
1997	1,685,833	+7.7%	1,973,142	+2.1%
1996	1,564,353	+12.5%	1,932,731	+11.2%
1995	1,390,394	+3.3%	1,738,036	+6.9%
<b>Change 95-04</b>	<b>742,915</b>	<b>+53.4%</b>	<b>1,132,925</b>	<b>+65.2%</b>

(a) includes passenger cars and light trucks (non-commercial)

(b) includes all licensed vehicles

\*as of 6/30/04

Source: Arizona Department of Transportation, Motor Vehicle Division

Table 13  
**CITY OF SCOTTSDALE**  
**SALES TAX RECEIPTS: AUTOMOTIVE CATEGORY**

<b>Fiscal Year</b>	<b>Automotive Sales Tax Receipts</b>	<b>Percent Change</b>
03/04	\$20,411,287	+0.2%
02/03	\$20,375,148	-2.4%
01/02	\$20,862,023	+2.5%
00/01	\$20,345,344	+13%
99/00	\$18,010,711	+44.8%
98/99	\$12,441,530	+1.5%
97/98	\$12,253,430	+65.9%
96/97	\$7,384,836	+10.8%
95/96	\$6,659,294	+15%
94/95	\$5,793,684	+10.8%

**Change 94/95-03/04: \$14,617,603 + 252%**

Notes: All figures are shown based on a **constant basis** 1.0% sales tax rate.

The automotive classification of the City sales tax covers all auto related sales and service. While new car sales do not account for all of the sales in this category, they do make up the vast majority of it (about 80-85%).

Source: City of Scottsdale Financial Services Department

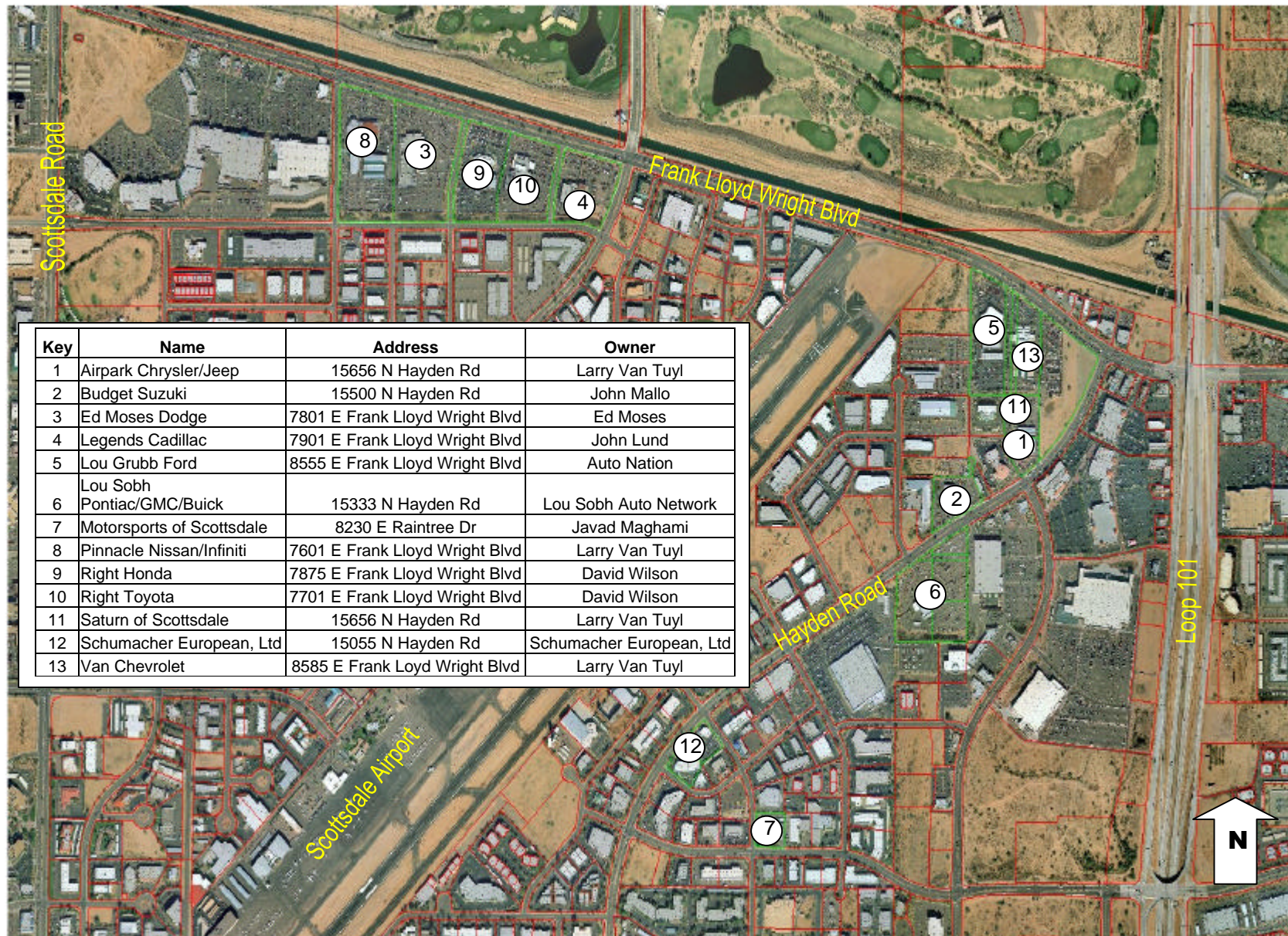
Table 14  
**CITY OF SCOTTSDALE**  
**TOTAL GROSS RECEIPTS: AUTOMOTIVE CATEGORY**

<b>TOTAL GROSS RECEIPTS PRIOR TO NON-TAXABLE DEDUCTION</b>						
	<b>FY 03/04</b>	<b>FY 02/03</b>	<b>FY 01/02</b>	<b>FY 00/01</b>	<b>FY 99/00</b>	<b>FY 98/99</b>
<b>North</b>	1,413,741,782	1,121,526,876	1,013,228,239	996,863,655	856,035,404	719,490,301
<b>South</b>	1,333,750,314	1,142,211,056	1,231,594,760	1,246,364,260	1,121,801,396	956,609,663

<b>TOTAL TAX PAID (Privilege &amp; Use Tax)</b>						
	<b>FY 03/04</b>	<b>FY 02/03</b>	<b>FY 01/02</b>	<b>FY 00/01</b>	<b>FY 99/00</b>	<b>FY 98/99</b>
<b>North</b>	9,623,264	7,814,385	7,052,050	6,936,815	6,519,162	4,711,452
<b>South</b>	9,361,469	8,183,570	9,124,510	8,797,928	7,597,070	6,392,948

Source: City of Scottsdale Financial Services Department

## Scottsdale Auto Mall Dealerships Scottsdale Airpark





# **Scottsdale Motor Mile Auto Dealerships** **Scottsdale Rd. & McDowell Rd. (between 64<sup>th</sup> St. & 72 St.)**



## **SITE INFORMATION**

For information about specific sites in the Scottsdale Area, please contact:

Katherine Hutton-Raby  
Economic Development Manager  
City of Scottsdale  
Economic Vitality Department  
7447 E. Indian School Road, Suite 200  
Scottsdale, AZ 85251  
email: [khutton@ScottsdaleAZ.gov](mailto:khutton@ScottsdaleAZ.gov)  
(480) 312-7989  
(480) 312-2672 fax

## **APPENDIX A**

- Demographics for North Scottsdale Auto
- Mall Market Area
- Demographics for South Scottsdale Motor
- Mile Market Area

# SUMMARY DEMOGRAPHIC PROFILE

2000 Census, 2003 Estimates & 2008 Projections

Calculated using Proportional Block Groups



Lat/Lon: 33.631900 / -111.895194

September 2004

RS1

N Hayden Rd & E Frank Lloyd Wright Blvd Scottsdale, Arizona		1.00 mi radius	3.00 mi radius	5.00 mi radius
POPULATION	2003 Estimated Population	5,681	49,971	146,674
	2008 Projected Population	6,591	57,624	168,401
	2000 Census Population	5,135	45,370	132,420
	1990 Census Population	1,548	19,502	78,150
	Historical Annual Growth 1990 to 2003	20.5%	12.0%	6.7%
	Projected Annual Growth 2003 to 2008	3.2%	3.1%	3.0%
	2003 Median Age	35.6	37.7	39.0
HOUSEHOLDS	2003 Estimated Households	2,597	20,783	59,126
	2008 Projected Households	2,964	23,714	67,049
	2000 Census Households	2,371	18,986	53,806
	1990 Census Households	592	7,181	29,198
	Historical Annual Growth 1990 to 2003	26.1%	14.6%	7.9%
	Projected Annual Growth 2003 to 2008	2.8%	2.8%	2.7%
POPULATION BY RACE	2003 Estimated White	92.1%	92.7%	92.9%
	2003 Estimated Black or African American	1.5%	1.3%	1.2%
	2003 Estimated Asian & Pacific Islander	2.7%	2.7%	2.5%
	2003 Estimated American Indian & Native Alaskan	0.4%	0.3%	0.4%
	2003 Estimated Other Races	3.3%	3.0%	2.9%
	2003 Estimated Hispanic	8.0%	7.6%	7.5%
INCOME	2003 Estimated Average Household Income	\$ 86,795	\$ 97,467	\$ 103,055
	2003 Estimated Median Household Income	\$ 63,463	\$ 74,498	\$ 76,191
	2003 Estimated Per Capita Income	\$ 39,689	\$ 40,830	\$ 41,865
EDUCATION (AGE 25+)	2003 Elementary	1.2%	1.3%	1.2%
	2003 Some High School	2.9%	3.2%	3.3%
	2003 High School Graduate	15.2%	14.7%	14.7%
	2003 Some College	25.4%	24.5%	24.8%
	2003 Associates Degree Only	8.2%	7.3%	7.5%
	2003 Bachelors Degree Only	32.7%	33.2%	32.2%
	2003 Graduate Degree	14.3%	15.9%	16.3%
BUSINESS	Number of Businesses	624	4,077	8,425
	Total Number of Employees	7,316	46,716	90,911
	Employee Population per Business	11.7	11.5	10.8
	Residential Population per Business	9.1	12.3	17.4

This report was produced using data from private and government sources deemed to be reliable. The information herein is provided without representation or warranty.

# SUMMARY DEMOGRAPHIC PROFILE

2000 Census, 2003 Estimates & 2008 Projections

Calculated using Proportional Block Groups



Lat/Lon: 33.465644 / -111.935199

September 2004

RS1

N 68th St & E McDowell Rd Scottsdale, Arizona		1.00 mi radius	3.00 mi radius	5.00 mi radius
POPULATION	2003 Estimated Population	15,154	108,083	282,361
	2008 Projected Population	16,571	122,141	322,903
	2000 Census Population	14,274	98,976	256,811
	1990 Census Population	13,784	89,888	225,205
	Historical Annual Growth 1990 to 2003	0.8%	1.6%	2.0%
	Projected Annual Growth 2003 to 2008	1.9%	2.6%	2.9%
	2003 Median Age	36.5	34.8	32.9
HOUSEHOLDS	2003 Estimated Households	6,444	48,137	117,808
	2008 Projected Households	6,967	54,159	133,935
	2000 Census Households	6,112	44,110	107,403
	1990 Census Households	5,888	40,155	97,668
	Historical Annual Growth 1990 to 2003	0.7%	1.5%	1.6%
	Projected Annual Growth 2003 to 2008	1.6%	2.5%	2.7%
POPULATION BY RACE	2003 Estimated White	84.2%	81.4%	75.6%
	2003 Estimated Black or African American	1.9%	2.7%	3.3%
	2003 Estimated Asian & Pacific Islander	2.0%	2.0%	2.7%
	2003 Estimated American Indian & Native Alaskan	1.7%	2.4%	2.8%
	2003 Estimated Other Races	10.2%	11.6%	15.6%
	2003 Estimated Hispanic	19.3%	22.2%	28.3%
INCOME	2003 Estimated Average Household Income	\$ 50,216	\$ 55,629	\$ 55,305
	2003 Estimated Median Household Income	\$ 42,649	\$ 44,063	\$ 43,049
	2003 Estimated Per Capita Income	\$ 21,912	\$ 25,146	\$ 23,372
EDUCATION (AGE 25+)	2003 Elementary	4.9%	4.8%	7.2%
	2003 Some High School	10.1%	8.4%	10.0%
	2003 High School Graduate	27.5%	21.8%	20.3%
	2003 Some College	25.1%	27.7%	25.6%
	2003 Associates Degree Only	6.9%	6.6%	6.3%
	2003 Bachelors Degree Only	18.5%	20.7%	20.0%
	2003 Graduate Degree	7.0%	9.9%	10.6%
BUSINESS	Number of Businesses	573	6,601	14,623
	Total Number of Employees	7,951	94,277	206,921
	Employee Population per Business	13.9	14.3	14.1
	Residential Population per Business	26.4	16.4	19.3

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